



Share Report Results Requirements and Design

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Overview

LatitudeLearning will enhance the LMS reporting engine with a new Share Report Results feature. This tool will provide users a subset of Standard User Filters to create a list of their people (scoped to My People) with whom they want to share a Report Result record on demand, or as part of the Scheduled Reports feature.

The "Report Results Ready" notification will be enhanced to send to all users in defined Share list at time of report execution. Message content will include additional parameters that state who shared the report results.

Update Report Results record to display "Shared by: [Username]" under Report Title, above Standard Filters list.

Enhance logic of *Navigation* page to display "Reports" icon if:

- A. User has access to one or more records in Report List
- B. User has access to one or more records in Report Results list (so that "Student" managers will get access to Shared Report Results)

Angular Platform Standards

See document on Sharepoint here:

<https://sharepoint.colatitude.com/Shared%20Documents/Forms/AllItems1.aspx?RootFolder=%2fShared%20Documents%2fLMS%20Team%20Documents&FolderCTID=&View=%7bED715CC1-B382-48EC-A0DF-7504EDCE9693%7d>

Share Report Results

Create mechanism that adds one user's report results file to another users' Report Results page.

Then build a "Share Results" UI component that employs our Standard User Filter to define the population of users who can access a shared Report Results file. This component will be added to the bottom of the following pages:

1. Run Report
2. Add Schedule
3. Edit Schedule
4. Report Results

Any user can then define a set of people with whom they want to share a copy of their Report Results file.

- If share is triggered from the *Run Report* or *Report Results* page, results file should be sent once to the defined set of users in Preview list.
- If share is triggered on demand from *Scheduled Reports* page, by clicking "Execute Schedule" button, results file should be sent once to the set of employees who fit defined User Filters at the time of report execution.
- If share is triggered from automated *Scheduled Reports* page, file should be sent at defined Frequency (Daily, Monthly, Yearly, On Demand) to the set of employees who fit defined User Filters at the time of report execution.

Users will be notified via standard "Report Results" message that their manager has shared a report that is ready to view.

Title

Share Results: [Report Name] [Run Date]

Standard User Filter

- None
- Audience
- Department
- Organization
- Position
- Position Group
- User
- User Group

Preview List

Results are scoped to user's profile assignments in Organization and Reporting Hierarchies (Position Code or Person-to-Person).

Action Buttons

Share: Distributes selected report results file to all users in Preview list.

Cancel: Exits the component and returns user to previous page.

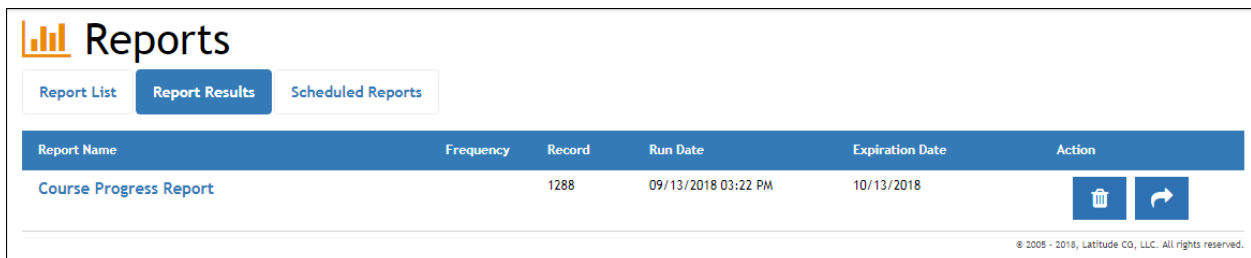
1. Enhance Report Results Page

Add new "Share Results" button to Action column on Report Results page.

The "Share Results" button should appear for all report results on page. So if person A distributed results to person B, person B should be able to distribute the results to person C (assuming B is within A's scope and C is within B's scope)



Icon: share

Hover Text: Share Results



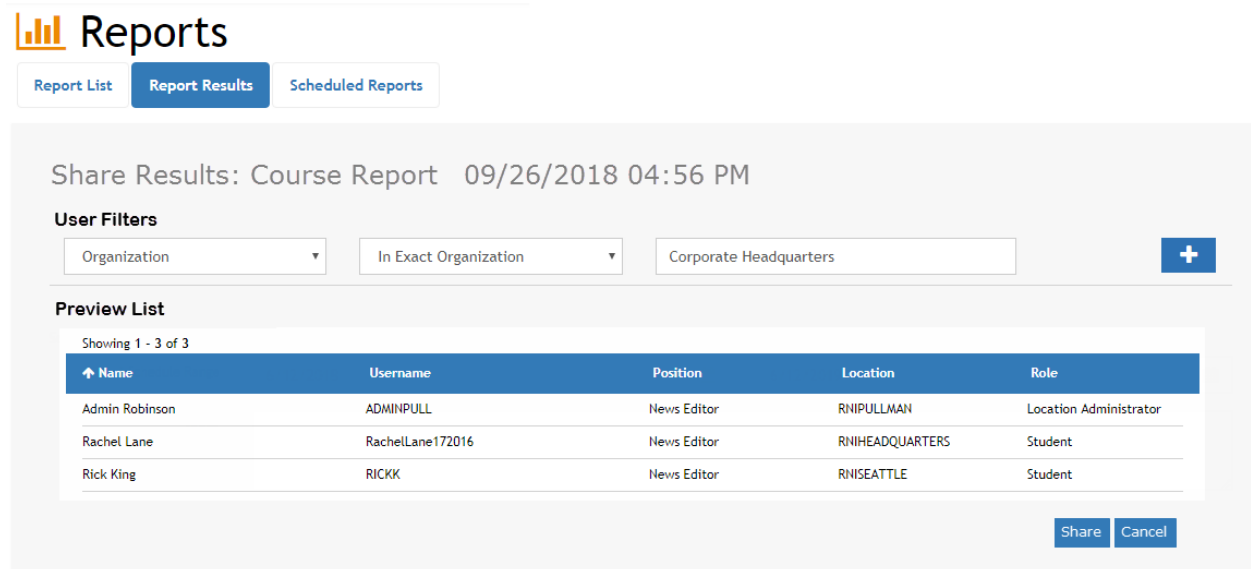
Reports

Report List | **Report Results** | Scheduled Reports

Report Name	Frequency	Record	Run Date	Expiration Date	Action
Course Progress Report		1288	09/13/2018 03:22 PM	10/13/2018	 

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On button click, user is routed to new "Share Results" component with URL: /lms-reporting/ReportResults/XXXX/Share




Reports

Report List | **Report Results** | Scheduled Reports

Share Results: Course Report 09/26/2018 04:56 PM



User Filters

Organization In Exact Organization Corporate Headquarters 

Preview List

Showing 1 - 3 of 3

Name	Username	Position	Location	Role
Admin Robinson	ADMINPULL	News Editor	RNIPULLMAN	Location Administrator
Rachel Lane	RachelLane172016	News Editor	RNIHEADQUARTERS	Student
Rick King	RICKK	News Editor	RNISEATTLE	Student

2. Enhance Add/Edit Schedule Components

Add new Share Results component to bottom of Add Schedule and Edit Schedule forms.

Reports

Report List Report Results **Scheduled Reports**

Edit Schedule: Test course report

Standard Filters

Organization In Exact Organization +

Schedule Report

Schedule run daily between the hours of 12AM and 6AM ET

* Schedule Range

Notes

* Frequency

Schedule is not automated, must be run manually.

Share Results

User Filters

Organization In Exact Organization +

Preview List

Showing 1 - 3 of 3

Name	Username	Position	Location	Role
Admin Robinson	ADMINPULL	News Editor	RNIPULLMAN	Location Administrator
Rachel Lane	RachelLane172016	News Editor	RNIHEADQUARTERS	Student
Rick King	RICKK	News Editor	RRISEATTLE	Student

Save Cancel

3. Enhance Run Report

Add new Share Results component to bottom of Run Report page.

4. Enhance Online Report Result

Update Report Results record to display "Shared by: [Username]" under Report Title, above Standard Filters list.

5. Enhance "Report Results Ready" Message

Enhance the "Report Results Ready" message to:

- A. Send to all users in defined Share list at time of report execution
- B. Include a “Shared By” field if the recipient of the message is not the person that executed the report.

[Participant],

The report is ready to view. [Click here to view your report results.](#)

Report Name: [ReportName]

Run Date: [RunDate]

Record Count: [RowCount]

Schedule Note: [ReportNote]

Shared By: [Username]

NOTE: Report Error message will not be modified. So only user who queued the report for execution will receive error notification.

6. Enhance Navigation Page

Enhance logic of *Navigation* page to display “Reports” icon if:

- A. User has access to one or more records in Report List
- B. User has access to one or more records in Report Results list (so that “Student” managers will get access to Shared Report Results)